Sales Guide to Lead Scoring

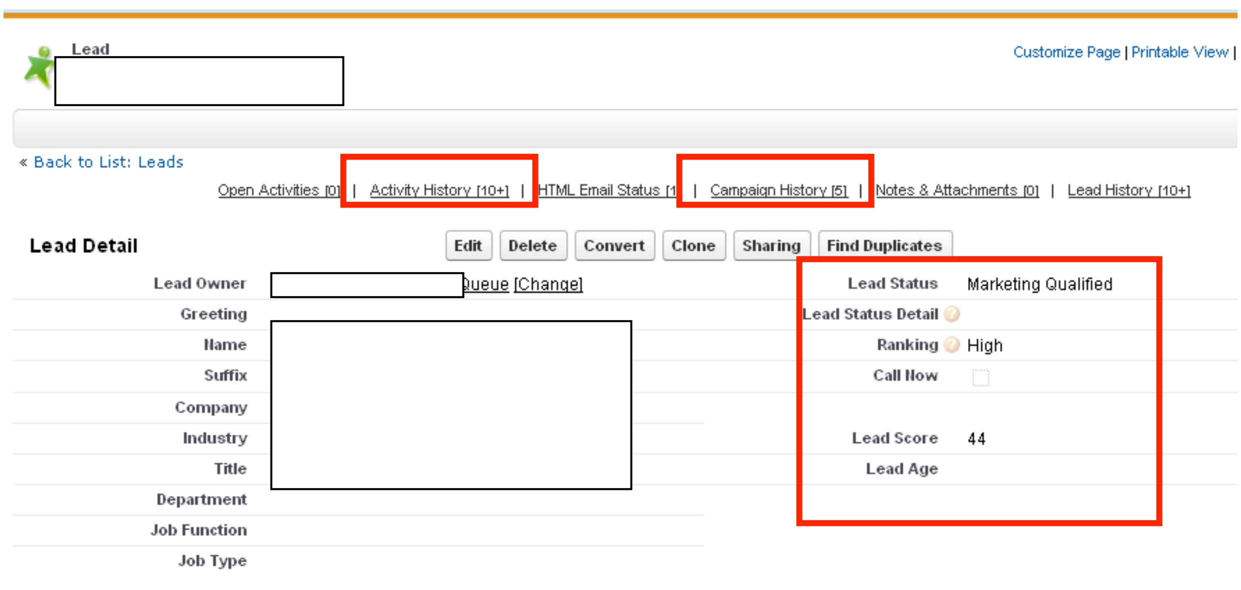
When you have launched the scoring system, you should have a meeting or two with the sales team to review the scores and the process for handing off leads. A short guide like this will help sales people understand why and how you are doing things. Clearly your process will differ from my experience, so edit this as needed.

Updated: XXXX XX, XXXX

Starting in XXXX 2012, Marketing started to score incoming leads, as well as existing leads, on various criteria. This Lead Score is designed to provide an indication of both a Lead's engagement with Company as well as their closeness to our ideal target.

The scores are based on the Global Sales Survey where you ranked your likelihood to call someone based on several dozen criteria. We combined this with knowledge of our clients to form a scoring model.

The Lead Score and other helpful details are provided on the Lead record. Highlighted are areas which can help you when understanding what a lead might like to discuss with you.



It is important to note that the Lead Score is a sum of all Demographic and Behavioural scores. Please check Activity History and Campaign History to understand how the lead is engaging with us.

Criteria for Passing Leads to Sales:
Marketing finds high scoring leads and passes them from our Nurturing Queue to regional queues for further evaluation. Your regional marketing manager will then pass a Marketing Qualified, high scoring lead to the appropriate territory manager based on their location, company, and requests.

Currently the qualification rule is:

- Score greater than XX (this may change depending on how many leads you need)
- Has opened or clicked *any* email (this helps ensure we send engaged leads)
- *Not* a "junk lead" which includes students, bad names, etc…

What does this mean for your leads?
This means you can receive a lead who first came to us 2 years ago, if they are *actively engaged* with us. It also means you could receive a lead who came in today who had a great title and company.

Scoring is not 100% perfect, so we are constantly reviewing the model and a human always checks Marketing Qualified Leads before passing them to Sales.

Scoring Summary:
This list describes briefly how our scoring model works using your input.

Demographic Scores

What	Why/When	Score Change	How Often?
Country Score *you could also link directly to the Campaign	Target country (no score if not serviceable country)	+5	Once or on change
Employee Range	1-10 11-50 51-500 Over 500	+2 +3 +5 +8	Once or on change.
Industry	Government Mining Investment Banks State Government Software	+5 +8 +1- -2 +5	Once or on change.
Job Title	CXO Strategic Planner Economist Accountant Sales Operations Marketing	+8 +12 +12 +9 -5	Once or on change.
Using Salesforce	Yes No Don't Know	+10 -2 +1	Once or on change.
Company Name	Global 2000 List Target Account List Major NGO University Federal Government Local Government Trade/Development Agencies	+20 +20 +15 +10 +15 +2 +5	Once or on change.
Personal Email Domain	@gmail.com, etc	-5	Once or on change

Behavioral Scores

What	Why/When	Score Change	How Often?
Ask a Question	They asked a webinar question	+10	Every Time
Contact Us Form	Requested help/Call Now	+20	Once per Day
Event Registration	Registered for any event	+15	Every Time
Event Attendance	Attended an Event	+20	Every Time
Event Missed	Missed an Event	-10	Every

			Time
Free Trial Request	Requested Trial/Call Now	+20	Once per Day
Gated Download	Filled Out Form for Download	+10	Every Time
Partner Registration	Partner registered for…	+10	Once per Day
Viewed Webinar Recording	Viewed recorded webinar	+5	Every time
Visits Any Web Page	Any web page (not careers)	+1	Every time
Opens Any Email	Opens any email	+1	Every Time
Clicks Link in Any Email	Clicks any email link (not unsubscribe)	+2	Every Time
Unsubscribes	Unsubscribes/Email Opt Out	-10	Every Time
Multiple Web Visits in 1 Day	More than 10 pages in a day	+10	Once a Day
Key Search Term Query	Their first visit found us via our top keywords	+5	Every Time
No Activity in 30 Days	No clicks, opens, visits, or form fill outs in past 30 days	-10	Every 30 Days
Subscribes to Newsletter	Opts in to X newsletter	+2	Each Time
Email Hard Bounces	Matches bad email reason	-20	Each Time

- **Demographics (*one time score*)**
  - Title, Job Function, Job Type (ranges from -2 to +20)
    - Higher ranking titles (like CEO or VP) receive more points
    - Titles like "strategic planning manager" or the usual suspects are provided more points than those with a tradition of not buying.
    - Self-employed, etc lose points.
    - Students and retired people lose points and are shunted out of our main programs.
  - Company Name and Global 2000 Lists
    - Leads on our Global 2000 list ($1B+ revenue, etc) receive +20
    - Major NGOs or Govt Agencies +20
    - Universities +10
    - Local Agencies +2
    - Economic or Trade Agencies +10
    - Others receive no points for Company.
  - Completeness of Contact Details
    - Personal emails -2
    - Missing Phone -2

- **Behaviour and Engagement (*score changes for every action in most cases)***
  - Request for Call (Call Now) +20
    - Requesting a call can be done by checking the "Call Now" box on new webforms. There are specific webforms where people can request additional details on our services.

- White Paper Downloads (shown under Campaign History)
  - These generally receive +5
- Webinar attendance ((shown under Campaign History)
  - Attending a webinar +10
  - Missing a webinar -5
- Event attendance (shown under Campaign History)
  - Attending an event or trade show +10
  - Missing an event -5
- Email Activity (Shown on all records in Salesforce under Activity History)
  - Open +1
  - Click a Link +2 (for *each* link clicked)
  - Subscribing to a Newsletter +2
  - Unsubscribing -2
  - Bad Email -5

- **Lead Statuses: Recycling and Trash**

  It is important that you Recycle or Trash leads to help Marketing refine the scoring criteria.

  When Marketing or a Salesperson determines someone is not Qualified for any reason, we change the Lead Status. Each reason code causes a Lead to *lose* points so that they are not reviewed again unless they become more actively engaged.

  Marketing programs will work with Recycled leads to determine when they may be ready for a sales person at a future time.

  - Changing Lead Status
    - Recycling: loses 15 to 35 points
    - Trash: usually resets score to 0